South Carolina Helpful Hints for Customer Service Toolkit

March 2006

Information Compiled by
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(Revised March 2006)

Customizing the ToolkitGIS_Template.mxd File

Revised, October, 2005

KMM

Toolkit 2004 includes an ArcGIS map document template file that is used to create ArcGIS map documents for customers (i.e., similar to the Toolkit2_template.apr used in Toolkit 4.1). It is recommended that the map document template be customized to save time in the future. Customizing the template can prevent the user from having to repeat numerous steps each time they create an ArcGIS map document for a customer.

Types of customizations may include, but are not limited to:

- Adding soils, roads, map index, common land units, or other types of frequently used spatial data to one or more data frames.

- Setting data frames properties, such as distance units and map units.

- Establishing standard legends for frequently used data layers such as soils, common land units, roads, or streams.

To Customize the GIS Template:

Note: *Prior to overwriting the original template, make a copy of the original file (for future use, if needed). Save it as COPY_ToolkitGIS_Template.mxd in the same folder as below.*

1. From **My Computer**, browse to this folder:

    C:\Program Files\USDA\Toolkit5\Templates

2. Double click on **ToolkitGIS_Template.mxd** to open the file.

3. To add data to the Data View, click the **Add Data** icon on the ArcGIS toolbar.

4. Browse to the layer(s) you want to add. Make sure that you add ALL data from the **F:/GEODATA**. **DO NOT ADD DATA FROM THE C:/DRIVE OR FROM ANY OLD ARCVIEW_COUNTYNAME FOLDER.**

5. It is recommended to add the minimum data that you need. For example, soils, clu layer, roads, and quad index. Adding too many layers will cause your map document to open slowly. **DO NOT ADD DOQQS TO THE TEMPLATE.**

6. Once you have loaded the layers you want to use, click on the **File** menu and click **Save**. You can save it as the same name OR *County_Template.mxd* if you like.

7. This will save your customizations in that template file to be used in all Customer Folders.

8. Open customer folder that you are working with and click on the **Customer File** tab. On the far left side of the screen, you will see five buttons. Click on the last button (*Load Template button*) to load the new customized template in that customer's folder. In the window that opens, select the **ToolkitGIS_Template.mxd (or any other name that you saved it as)** from the list and click Open.

Creating and Printing a Map Layout

June, 2005
KMM

1. After you have drawn your map, click on the **Map Products** button ( ).
2. The Map Products window will be display. Fill in all pertinent information.
3. Once info has been filled in, click on **OK**.
4. Say "**No**" to saving changes.
5. The map layout will be displayed. (*Note that the scale is not what you had originally set it to, nor does the scale bar match the scale set at the top of the screen).*
6. Click on **FILE – PAGE SETUP**.
7. Choose the **2600 printer** and put a **check in the box beside "Same As Printer."**
8. Click **OK**.
9. Change the scale bar at the top of the screen to the desired scale.
10. Click once on top of the scale bar on the map (you should see boxes around the layout frame) and then click once more on the scale bar to select it (you should now see boxes around the scale bar itself).
11. Right click on it and choose **Properties**.
12. Under "**When resizing…**" click on the drop down arrow and choose **Adjust Width**.
13. In the **Division Value** box, type in the desired scale.
14. Under **Number of Divisions** choose the number desired (2 or 3 would do).
15. Click **OK** to close the window.
16. Once you have the map the way you want it, click on the red **Adobe button** at the bottom of the Toolkit Toolbar to save the map layout. This saves the map to a .pdf file in the customer's **Resource Maps** folder that you can view anytime.

Attaching Graphics (Labels) to a Layer

June, 2005

KMM

This feature is only available with the Advanced Template in ArcMap. To change your template, Go to Preferences (wrench button) in Toolkit. Click on the GIS Tools tab and change from Basic to Advanced. Make sure to save changes to your preferences, then go open the customer's file.

A. Turning on and off Field #, Ac., and Landuse labels created with the Label Tool ( ) from the Consplan layer.

 1. Once you have used the Label Tool to create your Consplan labels, you will notice that the labels are tied to the Consplan layer. If you turn off the layer, the labels go away, and vice versa.
 2. If you want to see your Consplan layer without the labels, right click inside the **Data Frame** (anywhere inside the map) and choose **Properties**.
 3. Click on the **Annotation Groups** tab at the top of the screen.
 4. The **Group Name** for your Consplan labels should be **Consplan** (that is what it defaults to when you create your labels unless you changed it to something else).
 5. Uncheck the box beside the **Consplan group name** and click OK.
 6. If you want to see them again, just go back in and check the box.
 NOTE: If you add more labels to your Consplan layer you will need to do this again when you overwrite the existing Consplan annotation group.

B. Attaching soil labels to the Soils Map layer without using the Label Tool (a lot of people have asked about this since using the Label Tool creates so many soil labels all over the place. This is just a "neater" way to label your soils map).

 1. After you have used your **Soil Map tool** ( ) to create your Soil Map layer, click on the **Drawing Toolbar** at the bottom left hand side of your screen and choose New Annotation Target.
 2. Type in **Soils** under the **Annotation Group Name** and click **OK**.
 3. Right click on the **Soils Map layer** in the table of contents on the left side of the screen and choose **Properties**.

4. Click on the **Labels tab** and in the **Label Field** drop down window choose **MUSYM** to label the map unit symbol of the soil. Click **OK**.
5. On your **Drawing Toolbar** at the bottom of the screen, click on the drop down menu beside the **A** and choose the **label tool**.
6. Under **Placement** choose **"Place label at position clicked"** and under **Label Style** choose **"Use properties set for the feature layer."** Then click on the **Red X** to close the window.
7. Your cursor should have the **"label picture"** following it in the map. Click in each map unit to label its symbol. The label will be placed on the position where clicked. This will reduce the number of labels you would have gotten with the Label Tool.
8. Edit the labels (font, size and color) the way you would like them.
9. If you uncheck the Soils Map layer you'll notice that the labels remain on the map because they are not yet linked to the layer.
10. To link them, right click inside the **Data Frame** and choose **Properties**.
11. Highlight the **Soils Annotation Group Name** (not Soils Map) and click on the **Properties** button on the right.
12. Under **Associated Layer**, drop down in the menu and choose **Soils Map** and click **OK**.
13. Click on **Apply** and then click **OK**. Now the Soils Map layer and the labels are tied together.

C. Creating road labels and attaching them to a layer (this is also the same concept if you wanted to create Tract Number labels and attach them to a layer).
1. Click on the Drawing Toolbar at the bottom left hand side of your screen and choose New Annotation Target.
2. Type in **Roads** (or Tract Number, whichever you are doing) under the **Annotation Group Name** and click **OK.**
3. On your Drawing Toolbar at the bottom of the screen, click on the A (New Text) button to manually create a graphic. You can also use the spline tool (squiggly line) to label roads.
4. After you have labeled all your roads (or tract numbers), edit the labels (font, size and color) the way you would like them.
5. To link the labels to a layer (Roads layer for road labels OR Consplan layer for Tract Number labels), right click inside the **Data Frame** and choose **Properties**.
6. Highlight the **Roads (or Tract Number) Annotation Group Name** and click on the **Properties** button on the right.

7. Under **Associated Layer**, drop down in the menu and choose either **Roads for the Roads layer OR Consplan for the Consplan layer** and click **OK**.

8. Click on **Apply** and then click **OK**. Now the appropriate layer and the labels are tied together.

   *NOTE: This entire concept will work for any layer and labels.*

Set Up Legends Using Unique Values
August, 2005
KMM

This feature is typically used with Practices Layers and Resource Inventory Layers, however, it can be utilized with the Planned Land Unit (PLU) Layers and even the Soils Layer.

1. Make sure **all** practice features have been attributed.

2. In the **Table of Contents** (left side of the screen), right click on the layer name.

3. Select **Properties** (the Layers Properties dialog window will open).

4. Select the **Symbology** tab.

5. In the **Show** area, select **Categories** and **Unique Values** for the legend type.
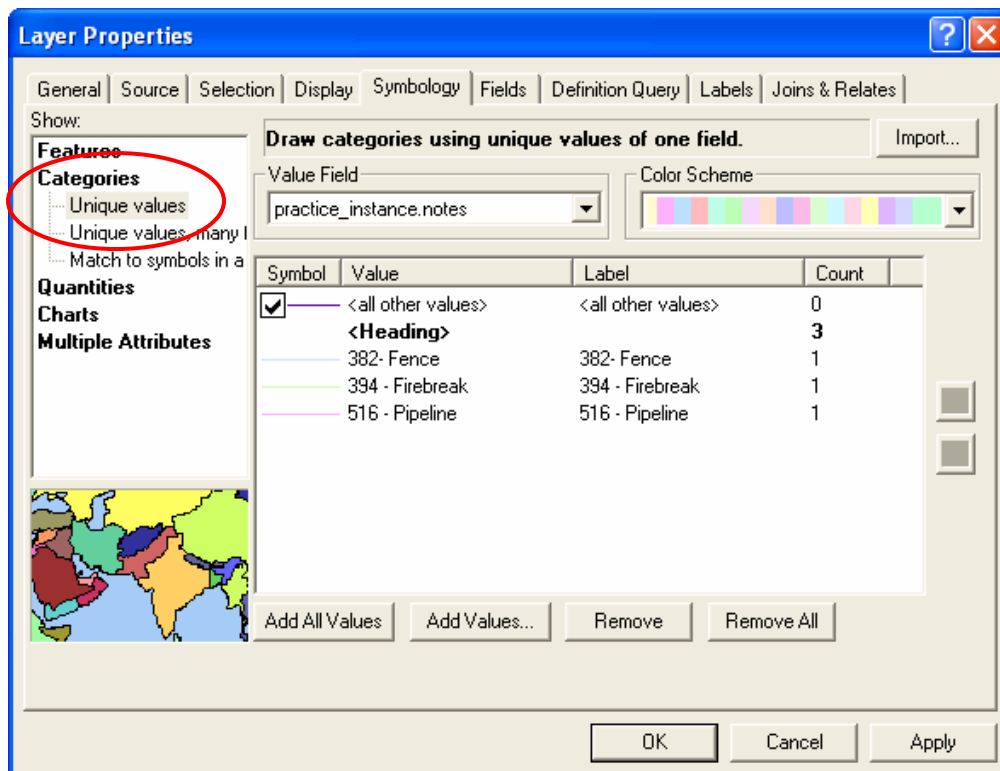
6. In the **Value Field** area, select the attribute from the drop-down list for sorting. You can use any of the values that show up in the value field. Examples are:

    A. **For Practices Layers**:

        a. If you enter specific notes when you attributed the practices layer, you can choose **practice_instance.notes**

        b. If you did not enter notes, you can simply choose **practice_name.**

    B. **For Soils Layers**:

        a. You can choose **MUSYM** and all map unit symbols listed in your map will each be assigned a different color.

    C. **For Planned Land Unit Layer**:

        a. If you have multiple tracts in your PLU layer called Consplan, especially if they are contiguous, you can choose **Tract number** and assign a different color to each tract.
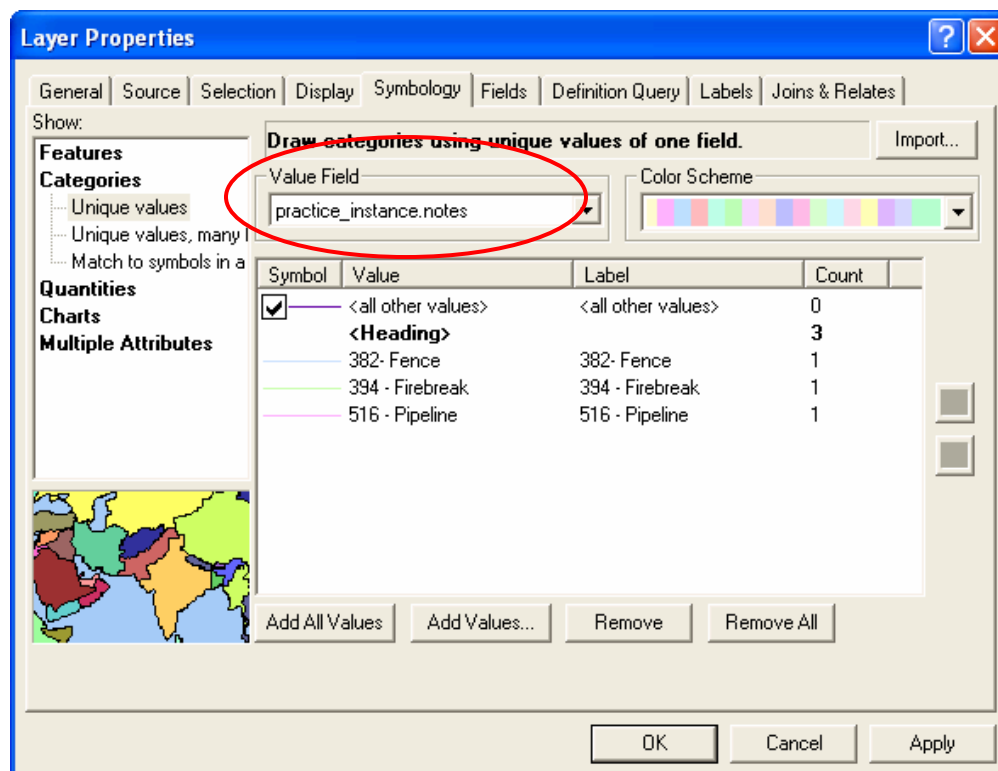
7. Click **Add All Values.**

8. As needed, you may need to click **Remove Values** if you have any "*NULL*" values being listed, or just values that you don't want to be listed.

9. Click **Apply**.

10. In the Values list, there will be a Value called **<Heading>**. Click in the Label column on the Label name (*Practice_instance.notes, Practice_name, Tract number, or Musym*) and hit the **Backspace** key to delete the Label name.
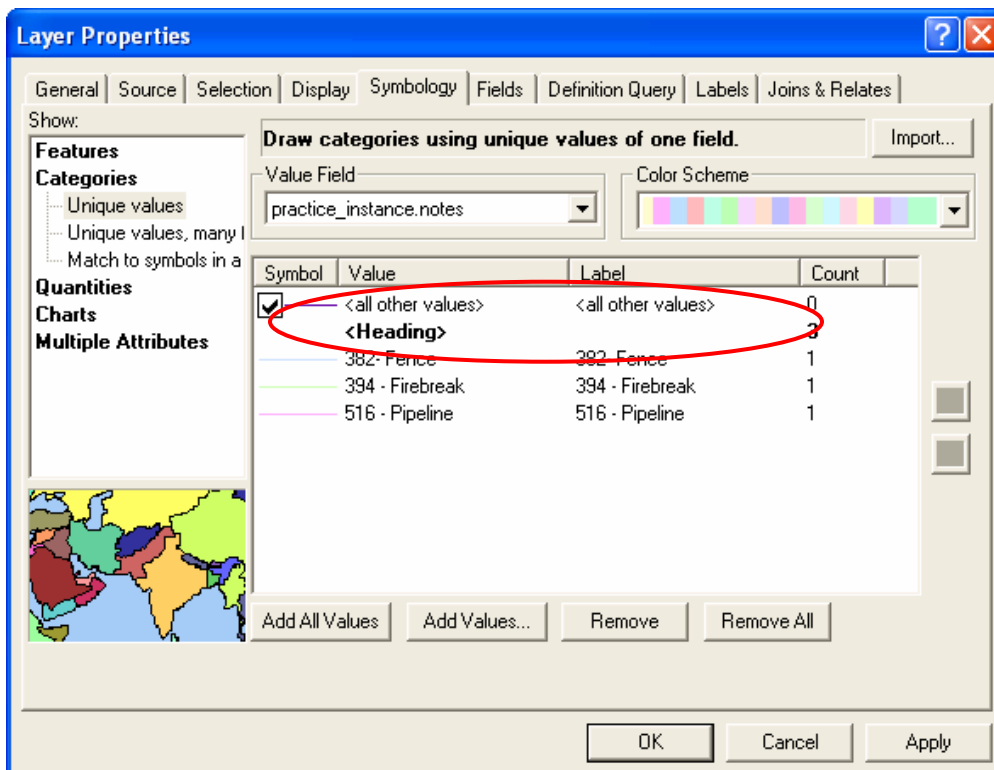
11. Click **Apply**.

12. You may want to **uncheck** the box beside **<all other values>** so that it is not listed in the Table of Contents or your map legend.

NOTE: If you uncheck the box, you will need to check the box back if you ever want to edit the layer. Failure to put the check mark back will result in missing lines that you edit.
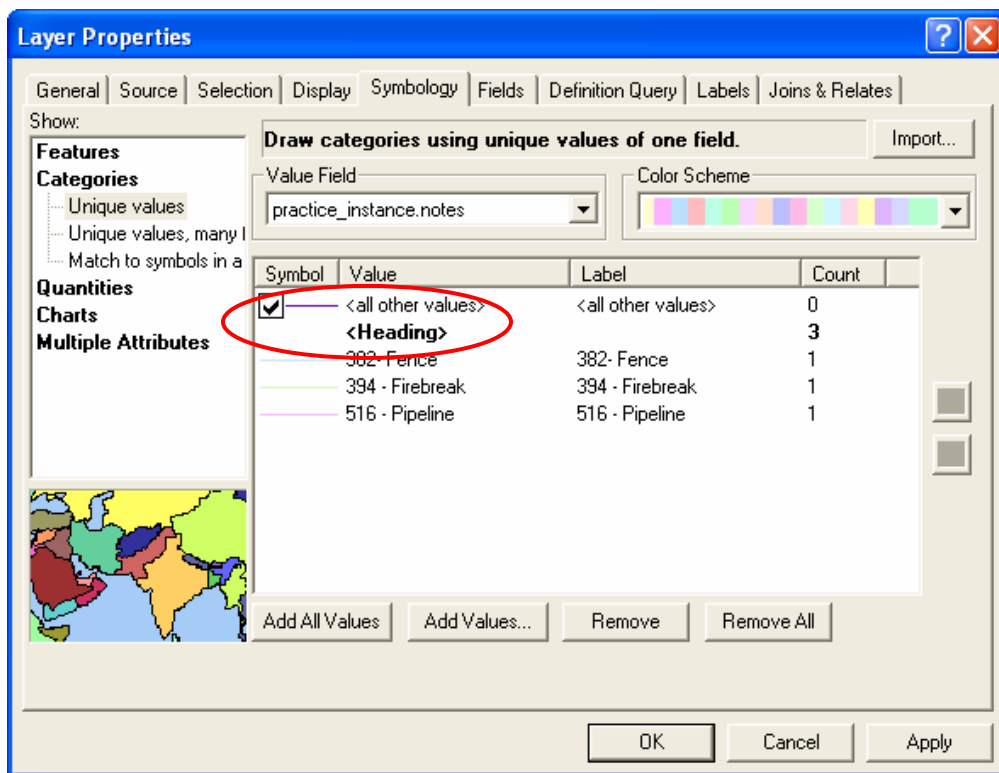
13. Once you are done, click **OK**.

14. Make sure to right click on the Layer Name and choose **Save Symbology**.

Using the Toolkit Stylesheet to Customize Symbols

August, 2005

KMM

The Toolkit Practice stylesheet was setup to assist Toolkit users with the symbolization (choice of symbol and color) of Toolkit Practice Layers where features have different type symbols. The Toolkit stylesheet can be modified as needed. *Note: The style sheet can be modified while in a Toolkit map document or from a separate non-Toolkit session of ArcMap.*

Loading the Stylesheet into Toolkit:

1. Save the NRCS_Toolkit5_Practice_Styles.style file in the following location: **C:\ArcGIS\arcexe83\bin\Styles**
2. Open ArcMap from the Desktop (you do not have to go through Toolkit).
3. Click on **Tools, select Styles and choose Style Manager**
4. The Style Manager window will be displayed. On the right side of the screen, click on the drop-down arrow on the Styles button
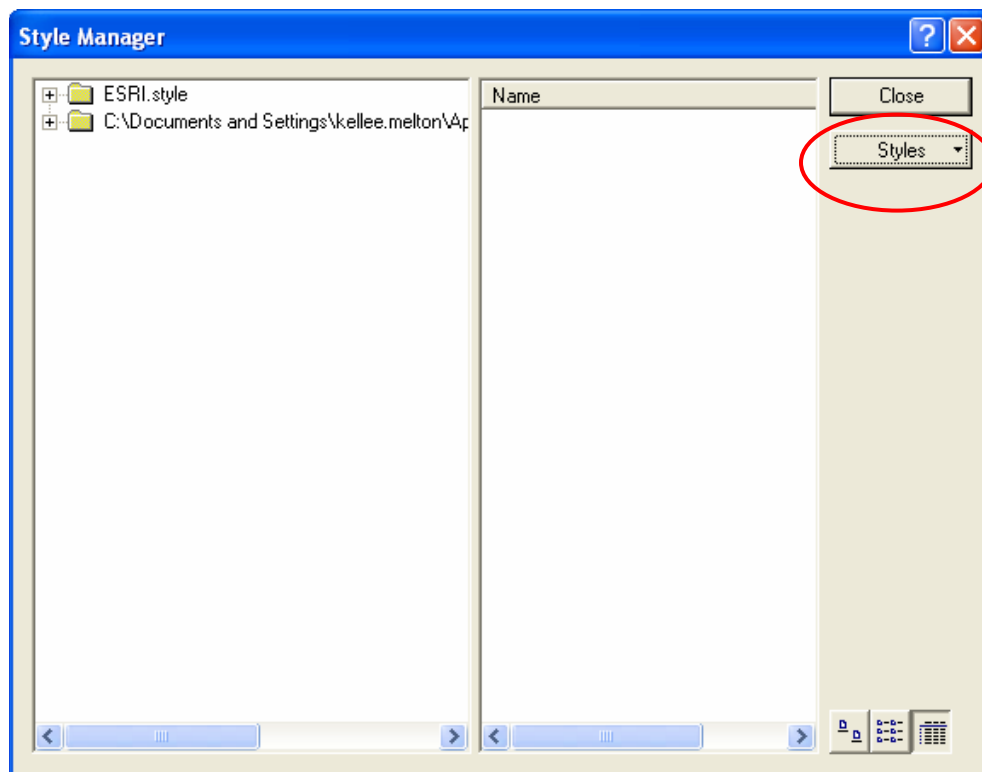
5. Select the **NRCS_Toolkit5_Practice_Styles**. The contents of the stylesheet will be displayed on the left-hand side.
6. Click the plus button to expand the contents of the stylesheet. Click on the folder of the desired category of symbol you wish to modify (Fill, Line or Marker Symbols). The symbols should appear on the right hand side of the **Style Manager Window**.
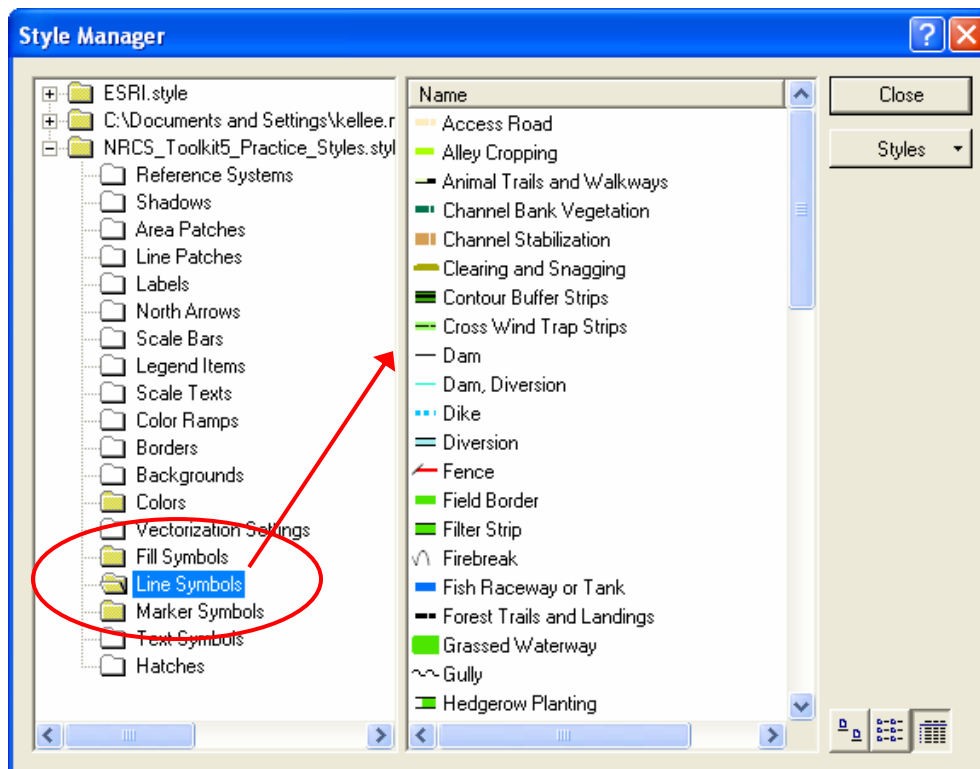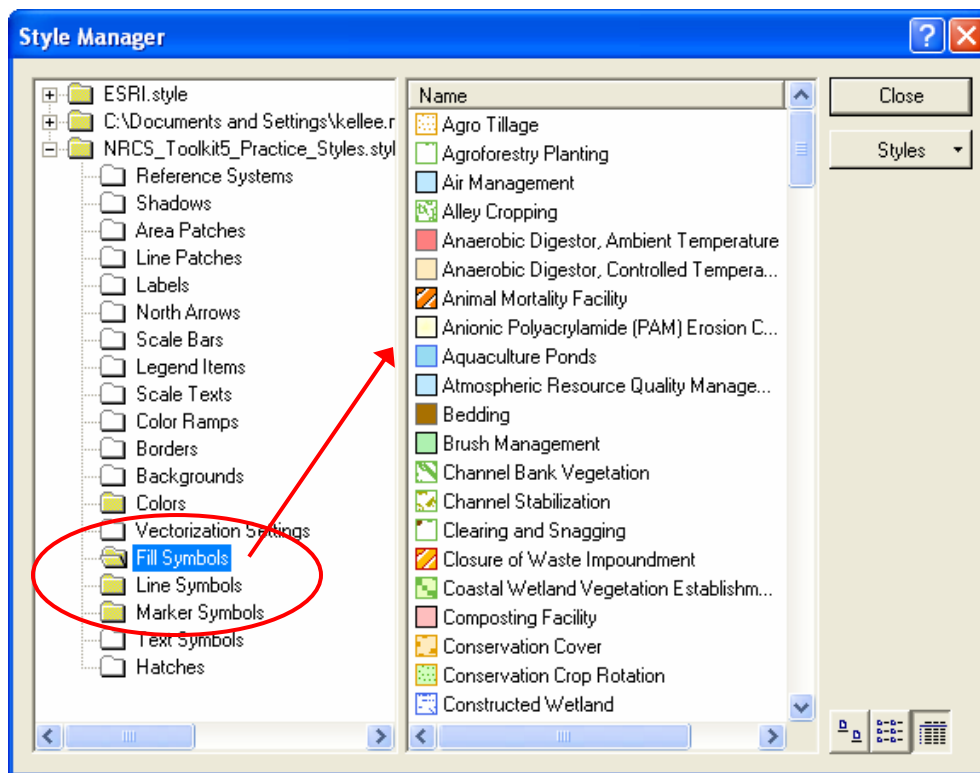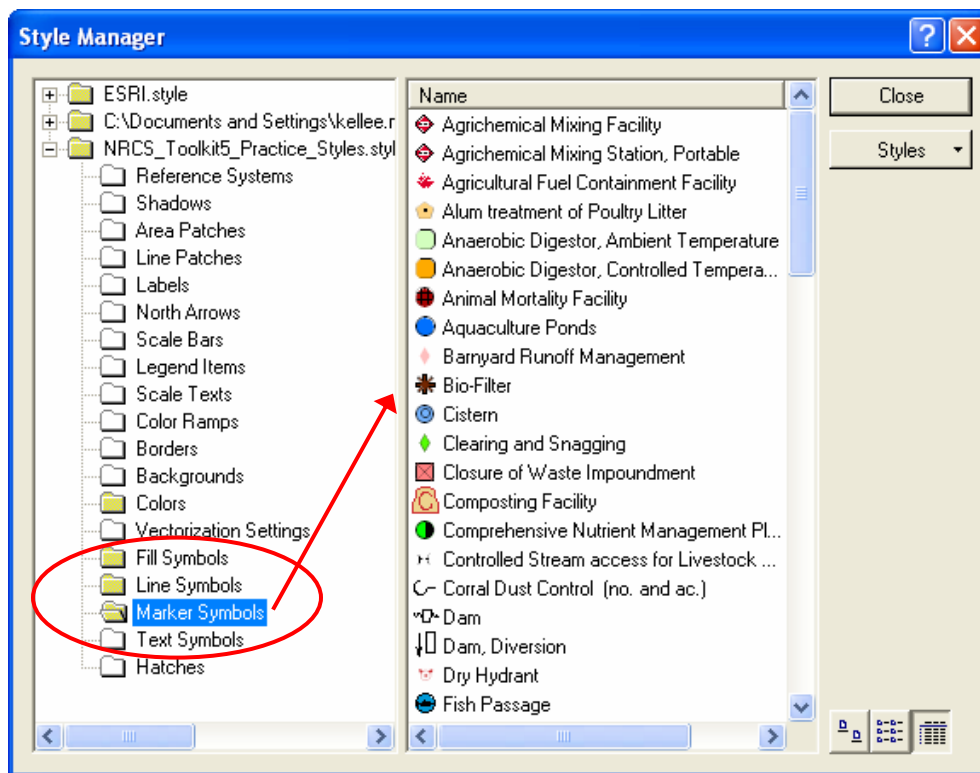
7. Locate the symbol you wish to change and double left click on the symbol. Make desired changes in the **Symbol Property Editor Window** and click the **OK Button** to accept the change. Repeat this process to change any Fill, Line or Marker Symbols.

8. When all the changes are complete, click the **Close Button** and the changes will be saved. *Note: Changes made on one computer do not affect the stylesheets on other computers. If the changes are desired on each computer in an office or state, the stylesheet should be modified first and then copied to all desired computers.*

Loading Symbols from the Toolkit Stylesheet for Unique Value Symbology

August, 2005

KMM

The Toolkit Stylesheet can be used in Unique Value legends for Practice Layers. Once you have customized the Toolkit Stylesheet (see instructions) for your county, it will make layer symbology a very easy process. *Note: Practice Layers should be attributed BEFORE changing their symbols using this process.*

Loading Symbols for Unique Value – Practice Features:

1. Double click on the layer name (*i.e. Practice_Lines*) in the **Table of Contents** (left side of screen).

2. Click on the **Symbology Tab** in the **Layer Properties Window.**

3. Click on **Categories**. Under **Categories** left click on ***Match to symbols in a style***.
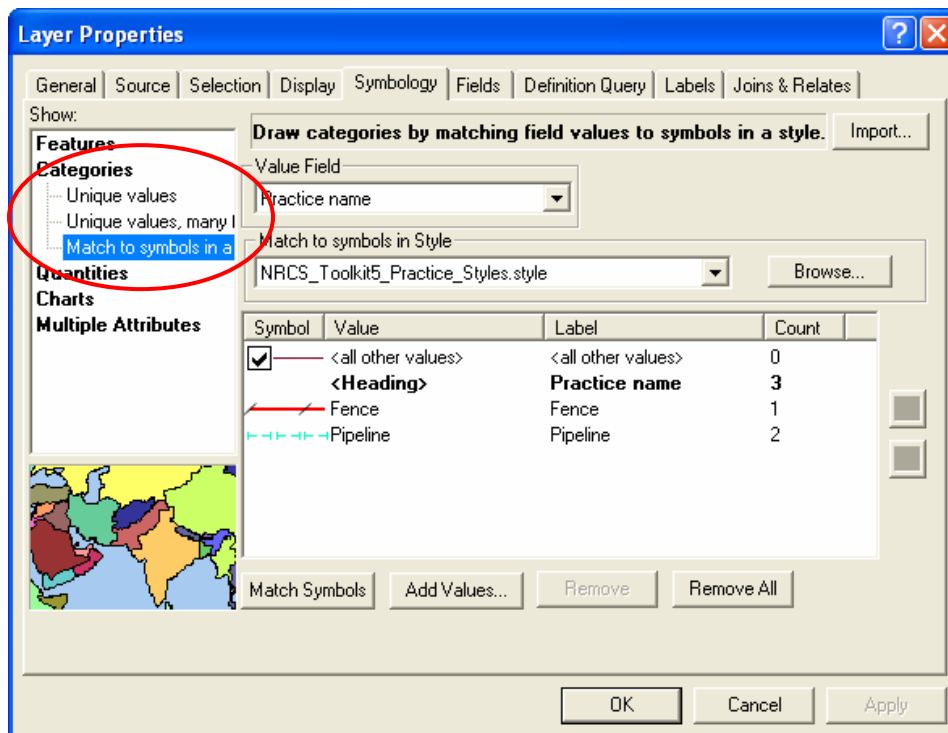
4. Use the pull down menu under the **Value Field** and select **Practice Name.**

5. Use the pull down menu under ***Match to symbols in a style*** and select ***NRCS_Toolkit5_Practice_Styles.style***.
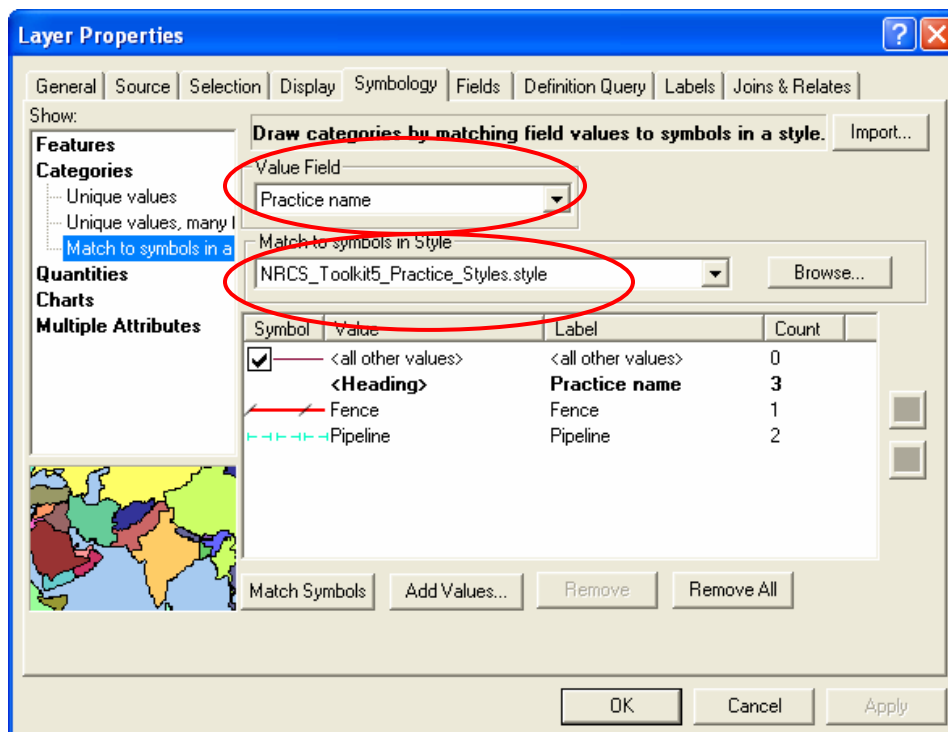
6. Uncheck the **All Other Values** checkbox and click the **Match Symbols Button**. *Tip: When editing a previously symbolized layer **be sure** to check the **All Other Values** checkbox until edits and attributing is complete. Then uncheck for map production.*
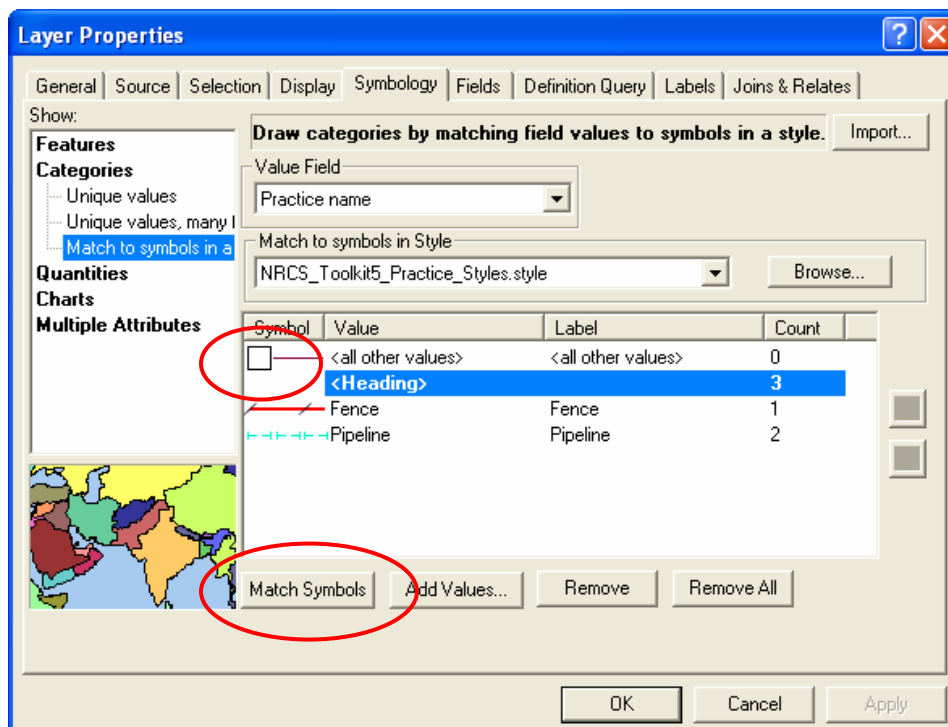
7. **Optional:** In the **Label Column** a bold text header will be displayed (e.g. Practice Name). Click on the bolded label and delete/backspace over the header.

8. **Optional:** To change any of the stylesheet symbols, double click on the symbol in the **Symbol Column** for a feature. In the **Symbol Selector Window**, left click to select the desired symbol. A preview of the symbol will display in the upper right-hand corner. Use the **Options Section** to adjust the symbol properties (e.g. fill color, outline color, outline width, line color and width, and point size, color and angle) then click the **OK Button.** Repeat this step until all desired changes have been made.

9. *Tip: Some Fill Symbols have foreground and background colors. To access and change a symbol's foreground and background colors, click on the* **Properties Button** *in the* **Symbol Selector Window.**

10. When complete click the **OK Button** to close the **Layer Properties Window.**

11. Once a layer has been symbolized, right click on the layer name in the **Table of Contents** and select **Save Symbology.**

Instructions on downloading GPS data from the Garmin GPS unit into Toolkit 2004

June, 2005
KMM

1. Check out the customer folder from the NCPD
2. Make sure unit is plugged into the computer
3. Double click on the **DNR Garmin icon** on your desktop (Version 4.4.2 is the latest)

DNRGarmin.lnk

4. Make sure the projection is properly set
5. Click on **File – Set Projection**
6. Under **POSC Codes - choose ESRI** (ignore the numbers in the drop down list)
7. Under **Datums/Projections - choose NAD_1983_UTM_Zone_17N**
8. Click **OK**
9. Click on **Waypoint – Download**
10. Waypoints will quickly download
11. Above the window where the list of waypoints are shown, click on the button beside **Track** (not the Track menu listed in the top toolbar).
12. Click on **File – Saved to – File**
13. Browse to **C:\Customer Files Toolkit\Customer File Folder\Resource Maps** folder and save the file there.
14. Give it a file name (i.e. GPS points)
15. Under the **Save as Type** – choose **ArcView Shapefile (Projected) (*.shp)**
16. Click **Save**
17. Once the file has been saved, go into Toolkit and open the GIS Template in the customer's file
18. Add your DOQQ to the project
19. Click on the **Add Layer** button and browse to the Resource Maps folder in that customer's folder and add the GPS shapefile that you just saved.

Delete Plans and Remove Folders
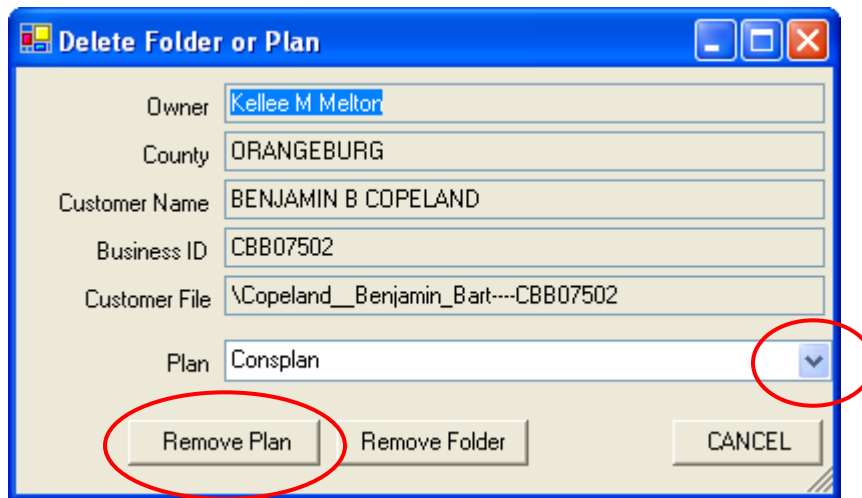
August, 2005
KMM

Many users have created extra "plans" in their Customer Files as the result of bringing in old planning information from Toolkit 4.1 OR from learning the new system and how ArcMap works. Specified users have been given the ability to remove these extra plans through their Toolkit permissions. Please try to clean up files by removing any "bad" information following these simple steps…

Instructions to Delete a Plan:

1. Check Out a Toolkit Customer. Open the Customer's folder and determine the plan(s) you want to remove. It is important to make sure you know what you are deleting. Please don't "assume" anything, deleted data is very hard to retrieve later.

2. Close the Customer's folder.

3. On the Folder tab, select the Customer from the list and click on **the Delete Folders or Plans button**.
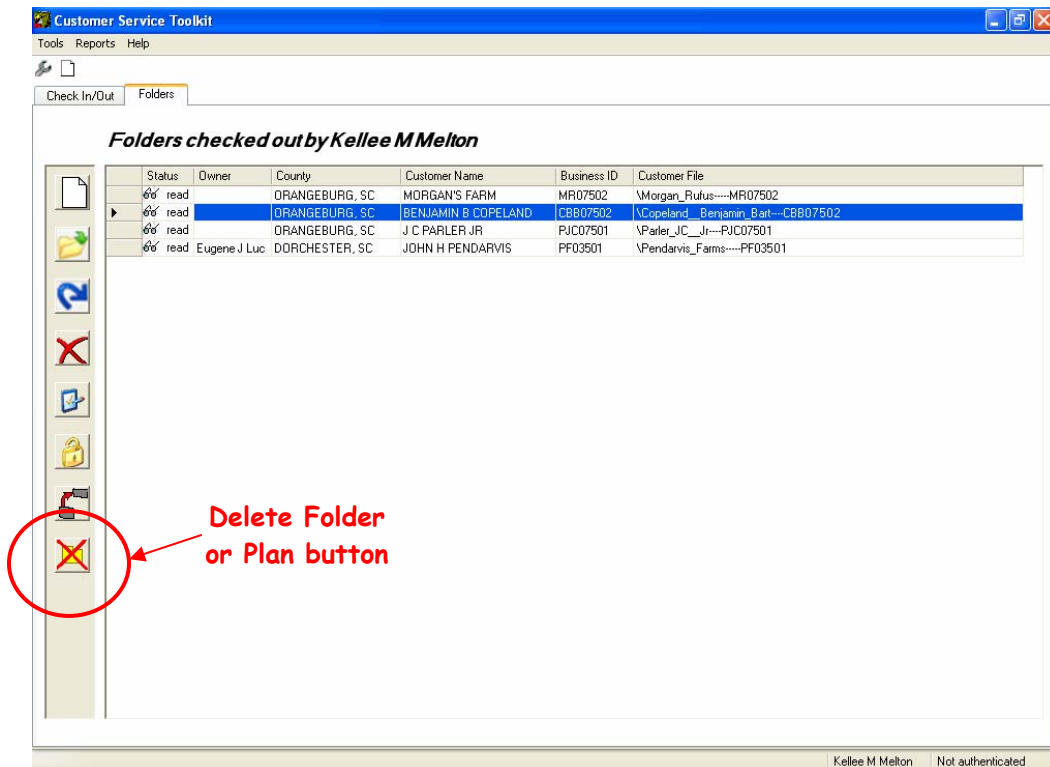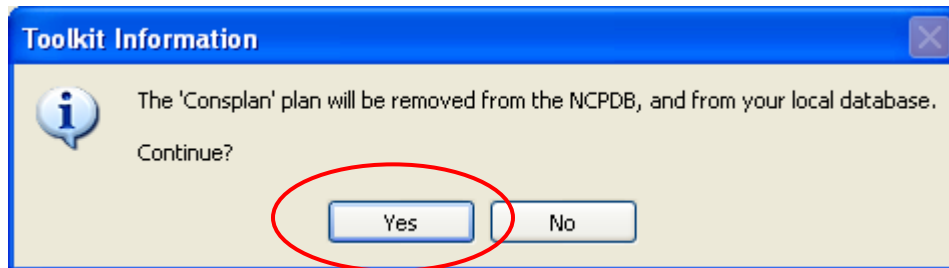
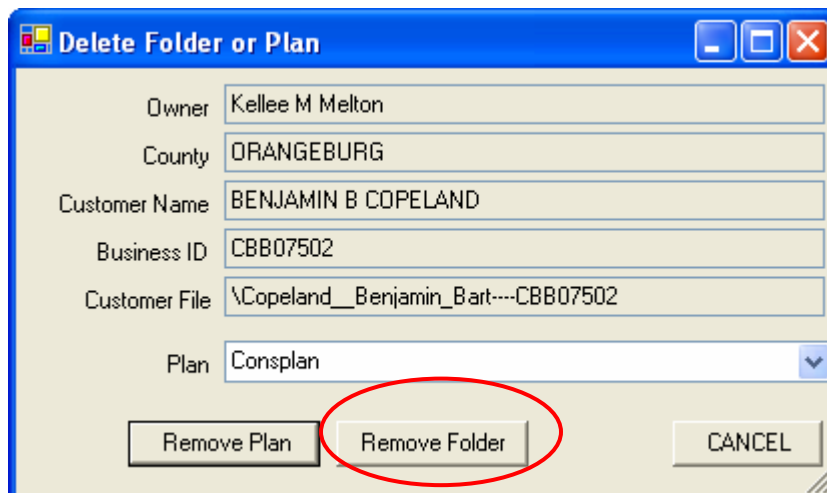4. **Select the Plan to delete** from the pull-down list and click the **remove plan button.**

5. When prompted, answer YES to remove the Plan. This will remove the Plan both from the NCPD and the server.


Instructions to Delete a Folder:

1. If you want to **delete the ENTIRE Customer File** from the server and the NCPD, click on **Remove Folder**.

2. When prompted, answer **YES** to remove the Customer folder from the Server and the NCPD.

Toolkit Information

The customer file will be removed from the Server, and all associated plans will be removed from the NCPDB, and from your local database.

Continue?

Yes   No
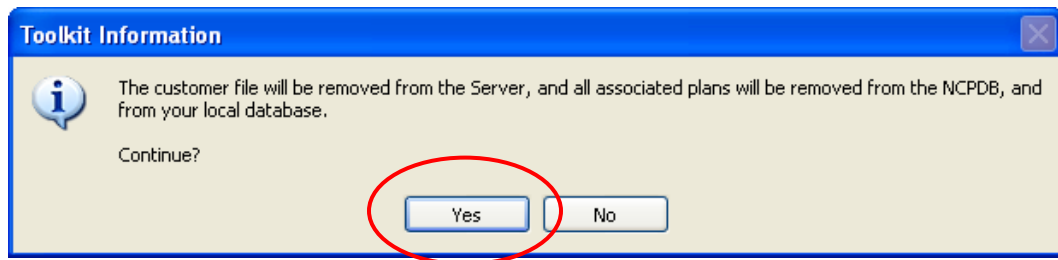
Customizing the Customer Folder
Structure in Toolkit

October, 2005
KMM

Many of you have asked how you can add a folder (for example, a Waste Management folder, a Job Sheet folder, etc.) in the Customer Files tab in Toolkit. These are the simple instructions on how to do that:

1. Open My Computer and browse to:
    C:\Program Files\USDA\Toolkit5\Config Files

2. Double click on the CustomerFolderStructure.txt file to open it. The file will open up in NotePad.

3. Simply type in the new folder name that you would like to appear in EVERY customer file. (*some examples include, Waste Management, Job Sheets, Photographs*).

4. Click File – Save (**NOT SAVE AS**).

5. Once you open the Customer Folder in Toolkit, you will see it in the list of folders under the Customer Files tab.

Refreshing Domain Data

October, 2005
KMM

The new Service Pack 1 release of Toolkit has an option for the user to re-synchronize to the NCPD when needed. Below are some scenarios when a user will need to re-synch in order to pick up any changes in practices, practice narratives, Conservation System Guides, etc:

- A new practice was **added** using CPS, but they are not showing up in Toolkit.

- A practice was **replaced** using CPS, but the new one is not showing up in Toolkit.

- A new practice was added to a conservation system using CSG, but the new one is not showing up in Toolkit.

- Practices that were replaced or retired from the national database are still showing up in the Toolkit Practice Schedule drop-down list.

How to Refresh Domain Data in Toolkit 2004 v5 SP-1

1. Start Toolkit.

2. Select **Reload Domain Data** from the Tools drop-down menu (located in the upper left-hand corner of the screen).

3. Authenticate.

4. Click **OK** and wait for the geodatabase to synchronize.

5. Close Toolkit.

6. Start Toolkit.

Creating Halos Around Labels

March, 2006

KMM

This feature will help to highlight your labels when using color infrared photography.

1. Create your labels be either using the map labels button ( ) or by using the label button (**A**) on the drawing toolbar.
2. Select the label(s) that you wish to halo by either clicking on them with your **pointer button** *OR* by clicking on **Edit – Select All Elements**. Dotted lines will appear around the labels once they are selected.
3. **Right click** inside one of the labels and click on **Properties**.
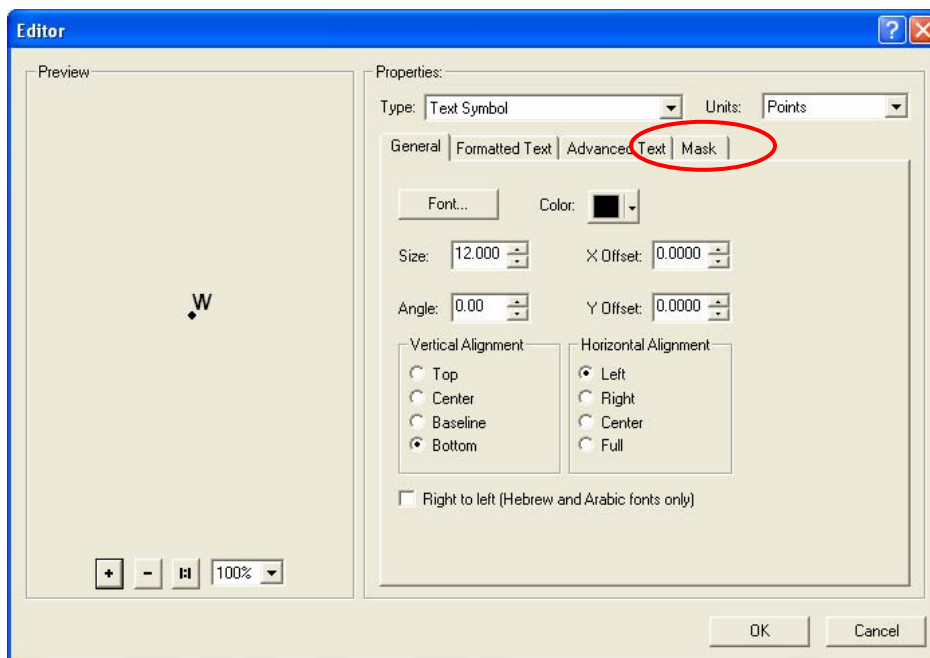4. Click on the **Change Symbol** button.
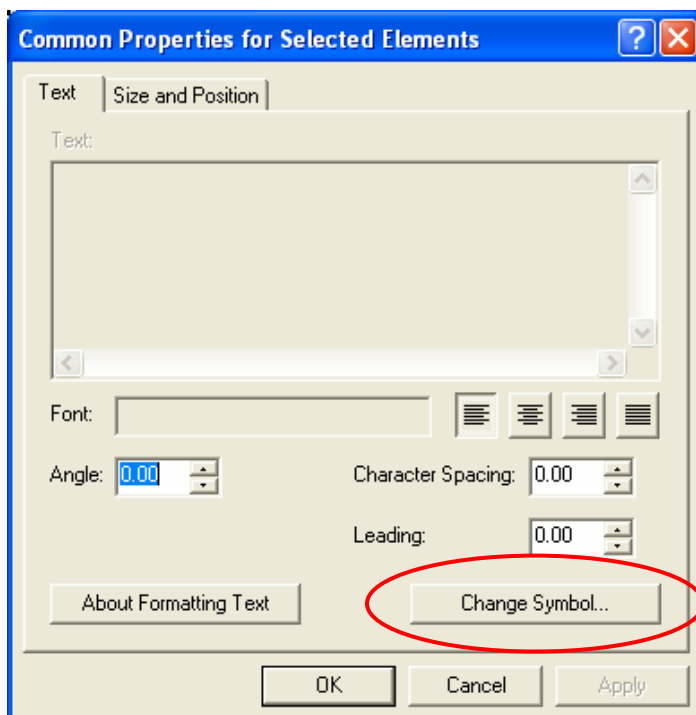
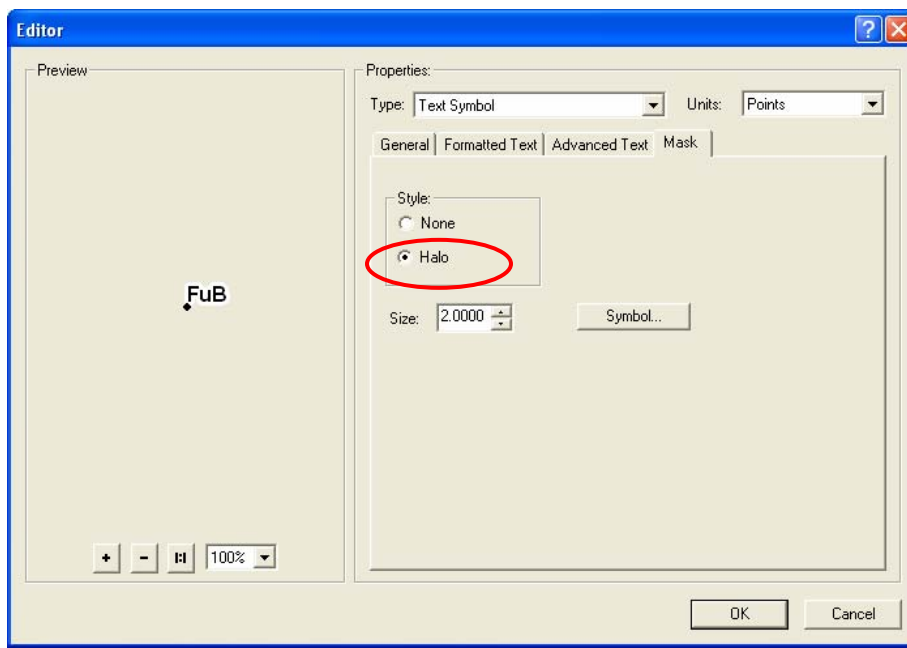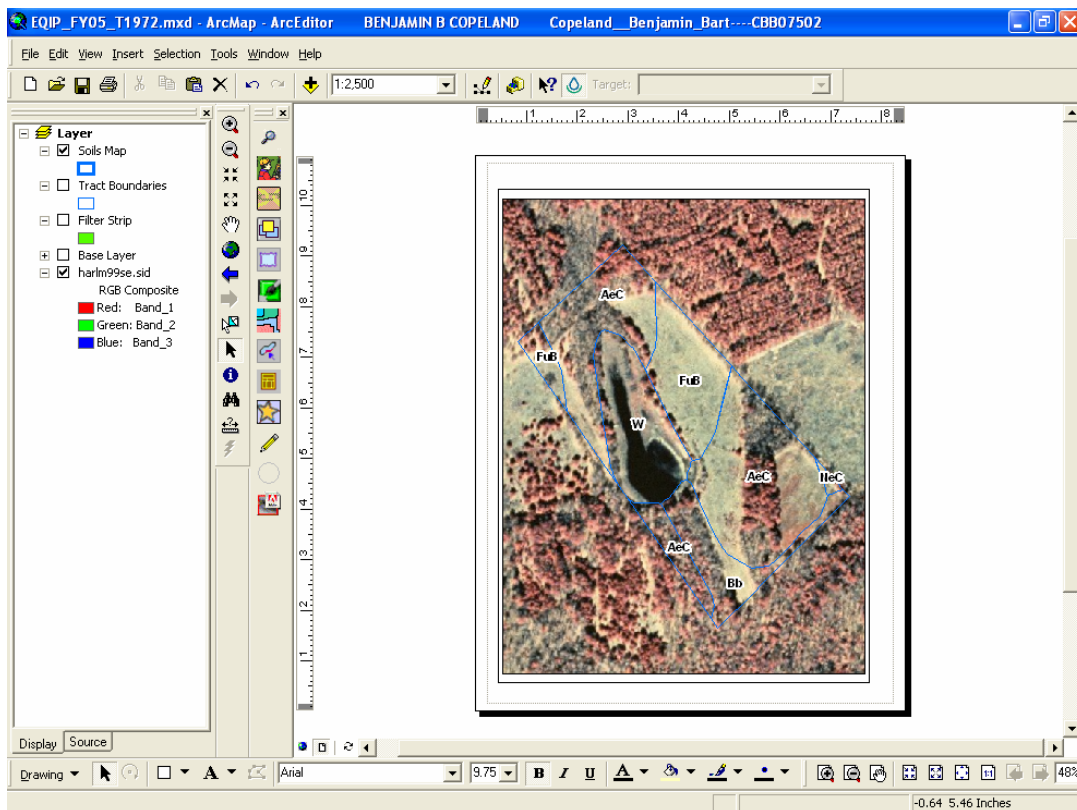5. Adjust your **Font Color, Size, make them Bold, etc.** and then click on **Properties**.
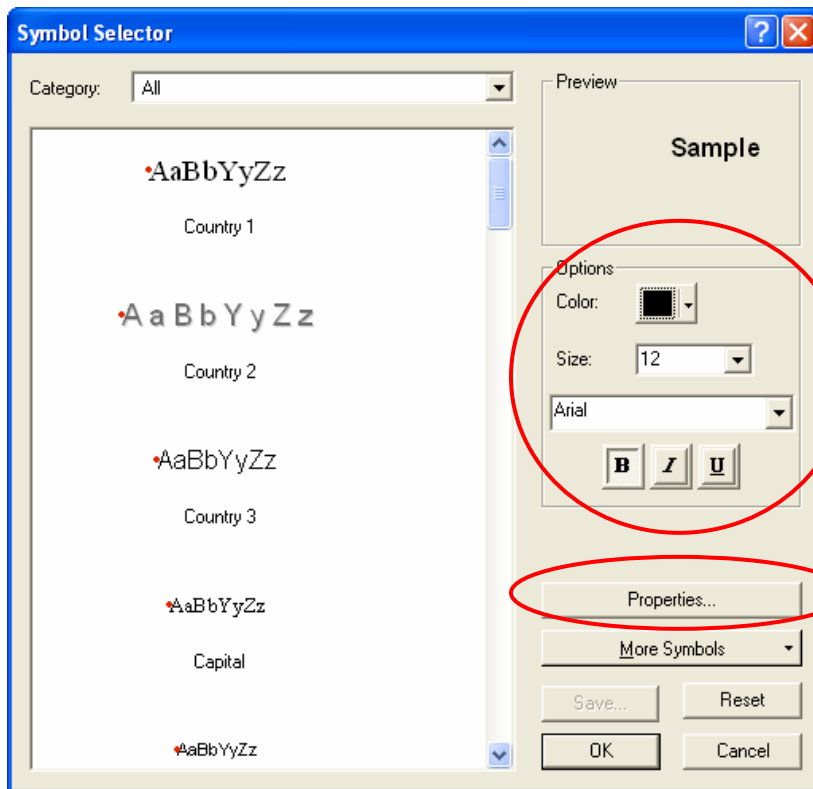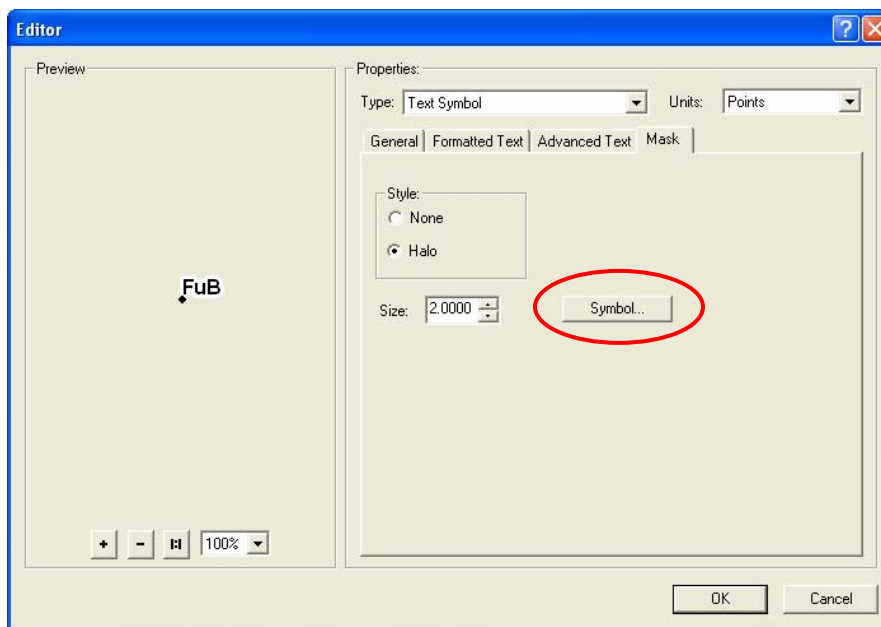
6. Click on the **Mask** tab.

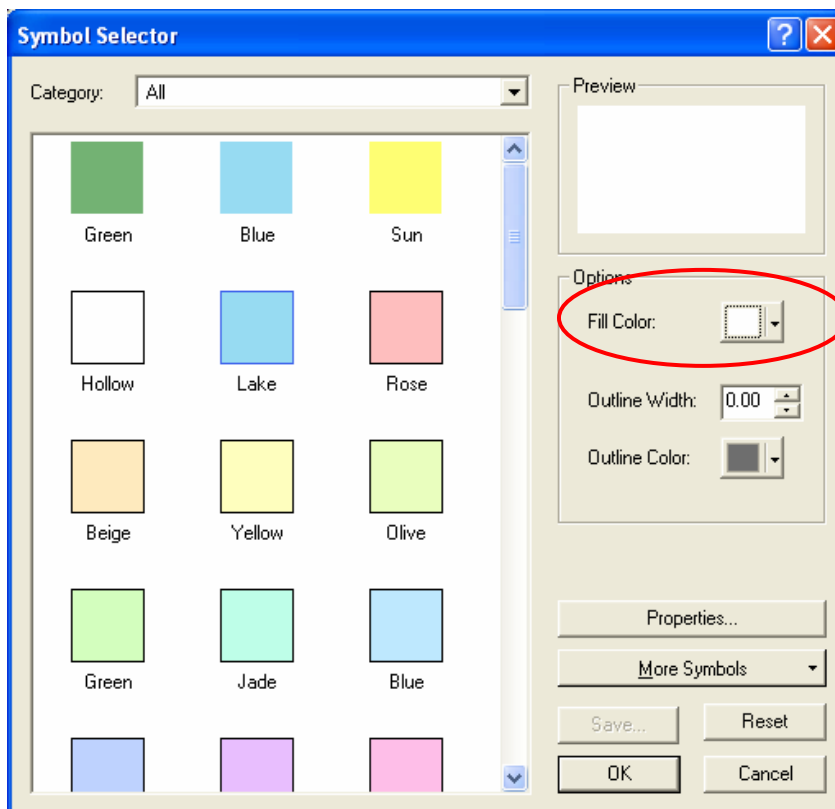7. Click in the circle beside **Halo**.

8. Click **OK, OK, OK**. Labels will appear on the map with a white halo around them (*see example below*).

9. To change the color of a halo (if you so wish), after you click to select Halo, click on the **Symbol** button to the right of the size selection.

10. Then select a **different fill color** other than white.

Displaying Topographic Images as Transparent

March, 2006
KMM

This option can be used to make your topographic image transparent where you can see your orthoimagery underneath it. Very helpful for calculating the drainage area needed to construct a pond, for example.

1. Add your orthoimagery and your topo to your ArcMap project.
2. **Right click** on the topo image name and select **Properties**.
3. Click on the **Display tab**.
4. In the **Transparent box**, type in the percentage of the transparency you desire. A good starting point may be 60%. Due to the nature of color differences with the topos, the same number may not work all the time.
5. Click **OK** once you have entered an acceptable percentage.
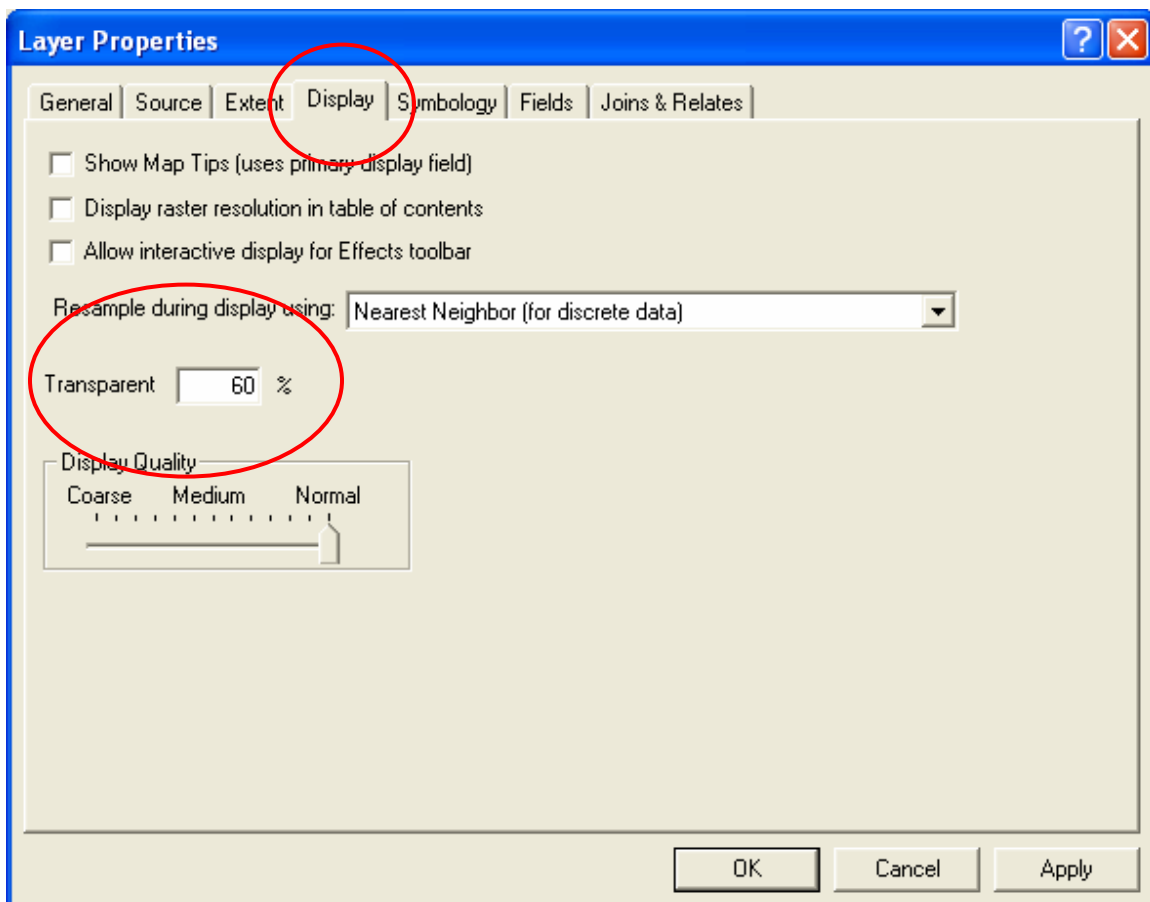
Soil Data Viewer 5.0

March, 2006
KMM

The new Soil Data Viewer 5.0 runs as a stand-alone program (does not operate through Toolkit at this time) and is a little different than the previous version that we are all used to.

Soil Data Viewer (SDV) Setup:

This must be completed the first time you use SDV (and on each machine in the office).

1. Start SDV from either the **icon** ( ) on your desktop or from **Start – All Programs – USDA Applications – Soil Data Viewer 5.0 – Soil Data Viewer**.
      (*You will get an information message telling you to select a valid soils database.*)
2. Click on **File – Select Database**
3. Browse to **F://geodata/soils and select the sc(*county FIPS code*).mdb** file. For example, Abbeville's file is sc001.mdb.
    NOTE: For those offices that have multiple counties, your data will be found under **F://geodata/soils/*countyname*.**
4. Soils for your county will be listed on the right side of the screen and all interpretations will be listed on the left side.
5. You will notice that at the bottom of the screen, it lists the current database that you have loaded into SDV. For those of you with multiple counties, you need to look there to know which county you have selected.

To create specific soil attribute reports:

Use these instructions to create soil reports for all attribute tables listed on the left side of the screen.   *These are NOT the non-technical reports.*

1. On the left side of the screen, **click on the (+)** beside the folder of the report you want to generate and select the soil property of the report that you are looking for.
2. On the right side of the screen, **select all the soil map units** that you want included in that report *(use the control key to select multiple map units at the same time)*.
3. You can click on the **View Selected Map Units** button to show all that you have selected (this may help in seeing if you missed any).
4. Then click on **Generate Report** to produce the results.
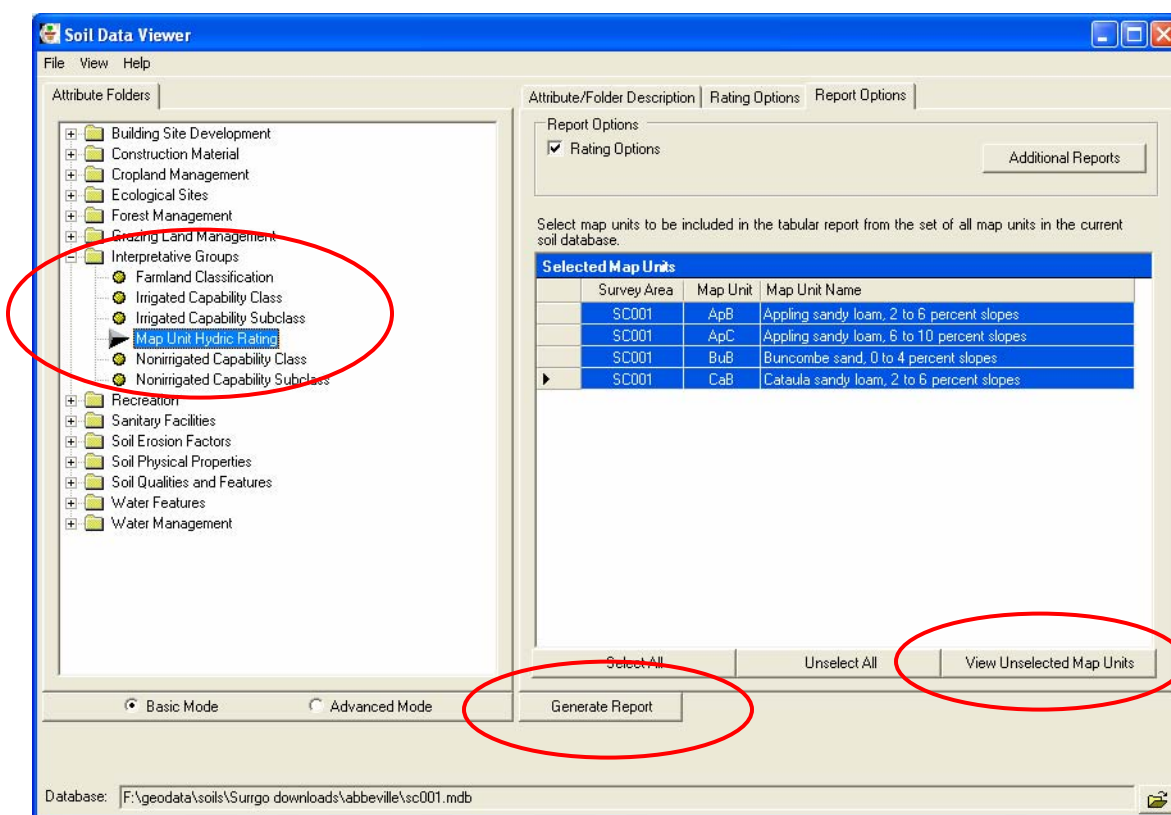
NOTE: The document that is created is in .pdf format and can be saved in any location on the computer, i.e. the customer's toolkit file, the C:/temp folder, etc.

To create non-technical soil reports:

**Use these instructions to create simple non-tech soil reports (S5, SOI and WSG) for conservation planning.**

1. Open up the soils database directly from the server at **F://geodata/soils and double click the sc(*county FIPS code*).mdb file**. For example, Abbeville's file is sc001.mdb.
   NOTE: For those offices that have multiple counties, your data will be found under F://geodata/*countyname*/soils.
2. The database will open up directly in Microsoft Access. A security window will likely pop up and you will click **OPEN**.
3. A soils report window will open up.
4. **Select all the soil map units** that you want included in your non-tech report *(use the control key to select multiple map units at the same time)*.
5. Under **Report Name** – select **Brief Map Unit Description**.
6. Click on the **Select Parameters** button.
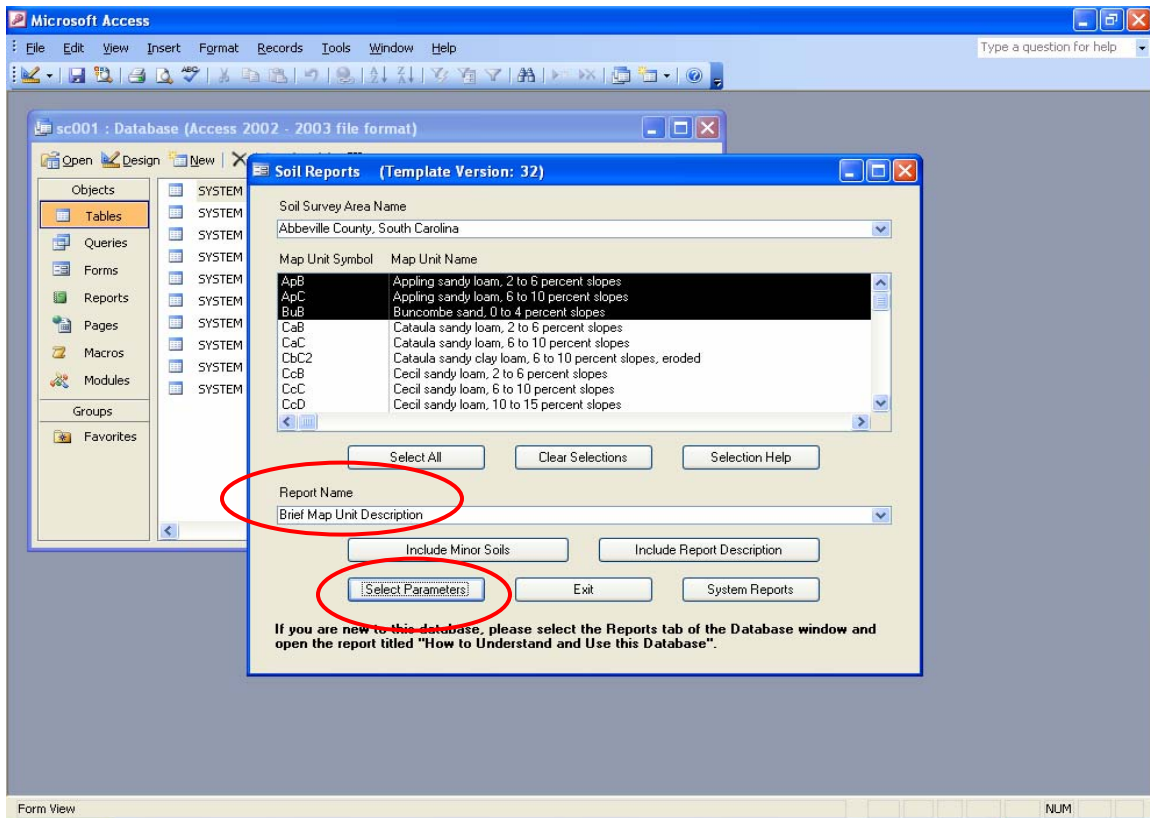
7. Select the **map unit description categories** that you want in your non-tech report, i.e. S5, SOI or WSG (*all can be selected by using your control key to select them all*) and then click **Generate Report**.
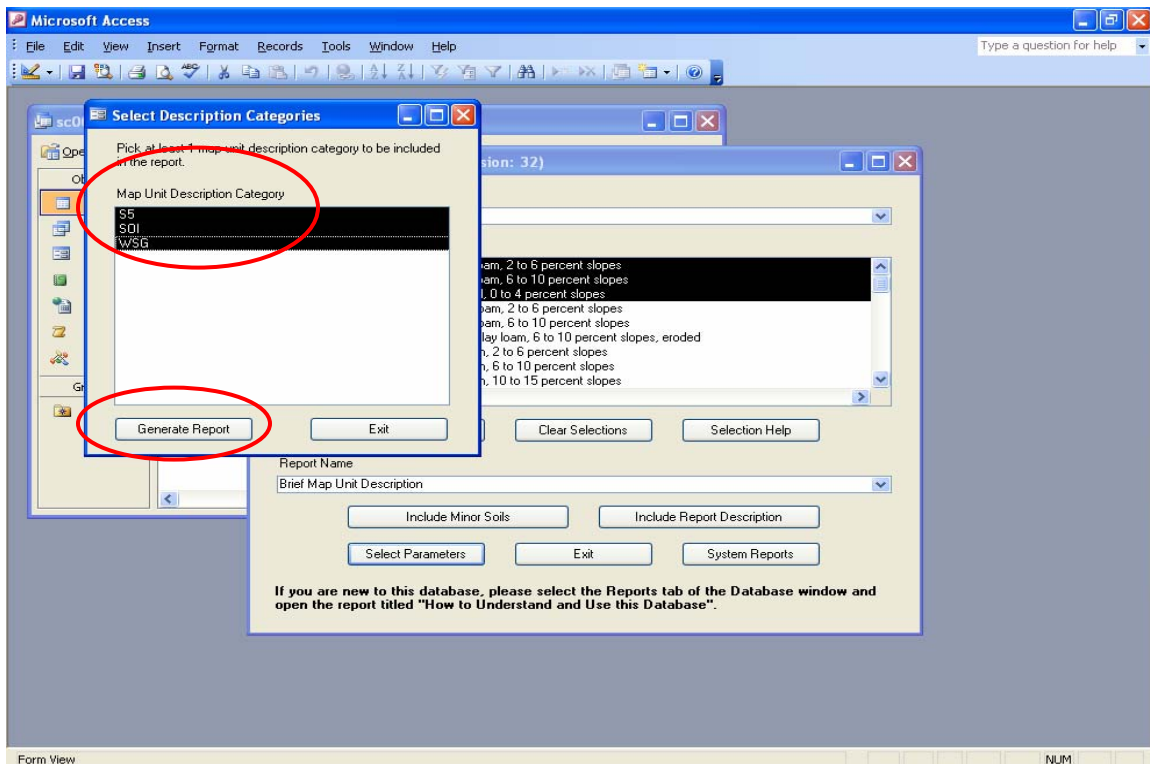
8. You can print it from this screen by clicking on the **Print Icon** or by clicking on **File – Print**
9. To save this report, you will have to click on the drop down arrow beside the **Microsoft OfficeLinks button** and select **Publish It With Microsoft Office Word** option.
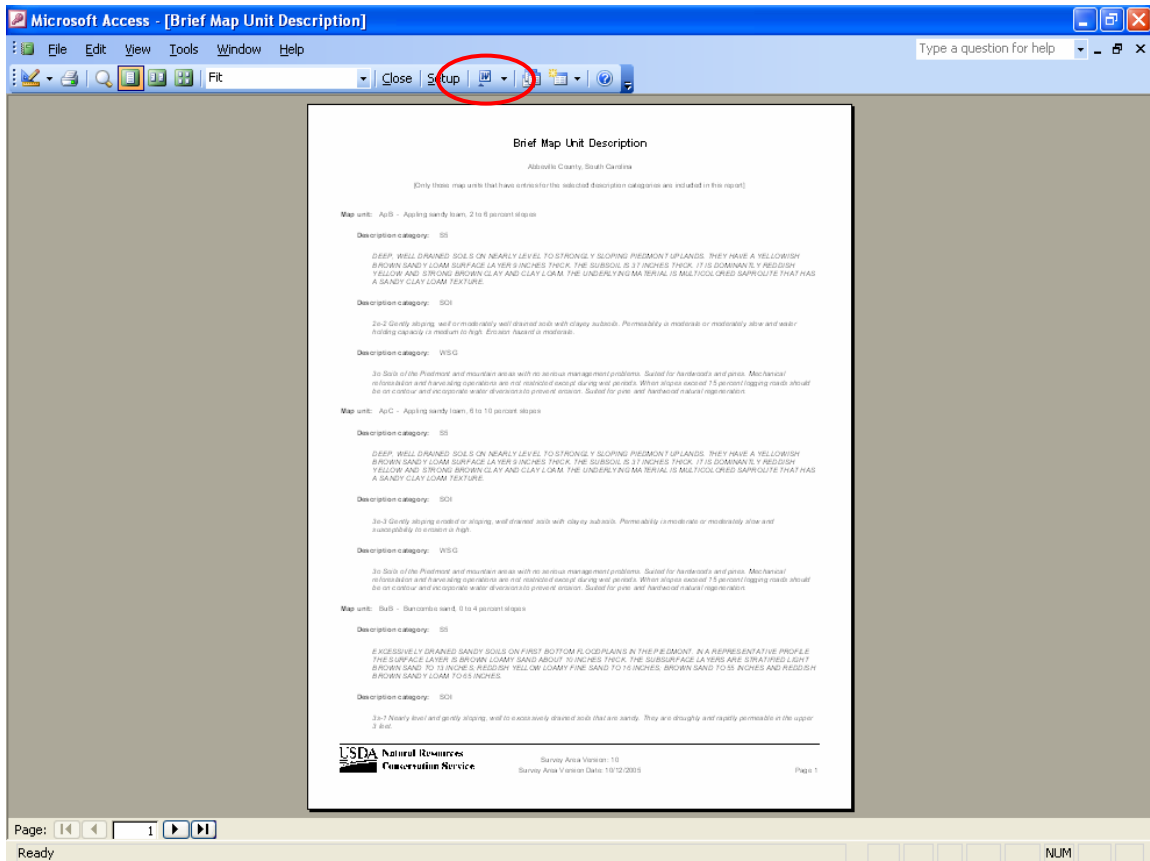
10. The report will dump into a Word document and you can then save it in the location of your choice.